

From Fragmented Planning to an Integrated Business Planning System

CROSS-EXECUTIVE VALUE CREATION

STRATEGIC PROOF

A multi-business manufacturing enterprise struggled with inconsistent performance despite strong market demand and clear strategic objectives. Planning activities were siloed across separate functions – strategy defined at the executive level, financial planning managed through annual budgets, and operational planning executed independently by supply chain and production teams.

The result was misaligned targets, frequent plan revisions, poor forecast accuracy, and limited visibility into enterprise performance. This case demonstrates how Fortis & Peak Consulting & Investment transformed fragmented planning into a single, synchronized enterprise capability – aligning Strategy, Finance, and Operations into one integrated system.

The Executive Challenge

How can leadership align strategy, financial targets, and operational execution into a single, synchronized planning system that drives predictable performance? The organization operated with three fundamentally disconnected planning layers, each functioning in isolation and pulling the enterprise in different directions.

Strategy Layer – CEO


Long-term growth and EBITDA targets defined at the top, but never translated into actionable operational plans that functions could execute against.

Financial Layer – CFO

Annual budgets built on static assumptions with limited linkage to real-time business dynamics, leaving finance disconnected from operational reality.

Operational Layer – COO

Supply and production plans driven by short-term constraints, with reactive adjustments to demand and supply changes rather than proactive alignment.

 The enterprise lacked a single version of truth – leading to conflicting decisions, inefficient resource allocation, and missed financial targets.

The Strategic Problem: Three Disconnected Systems

The core dysfunction was structural. Each function operated its own planning process with its own assumptions, timelines, and success metrics. Strategy set ambitious growth and EBITDA targets without a mechanism to translate them into supply chain or production realities. Finance built annual budgets that quickly became obsolete as market conditions shifted. Operations reacted to daily disruptions without visibility into the financial consequences of their decisions.

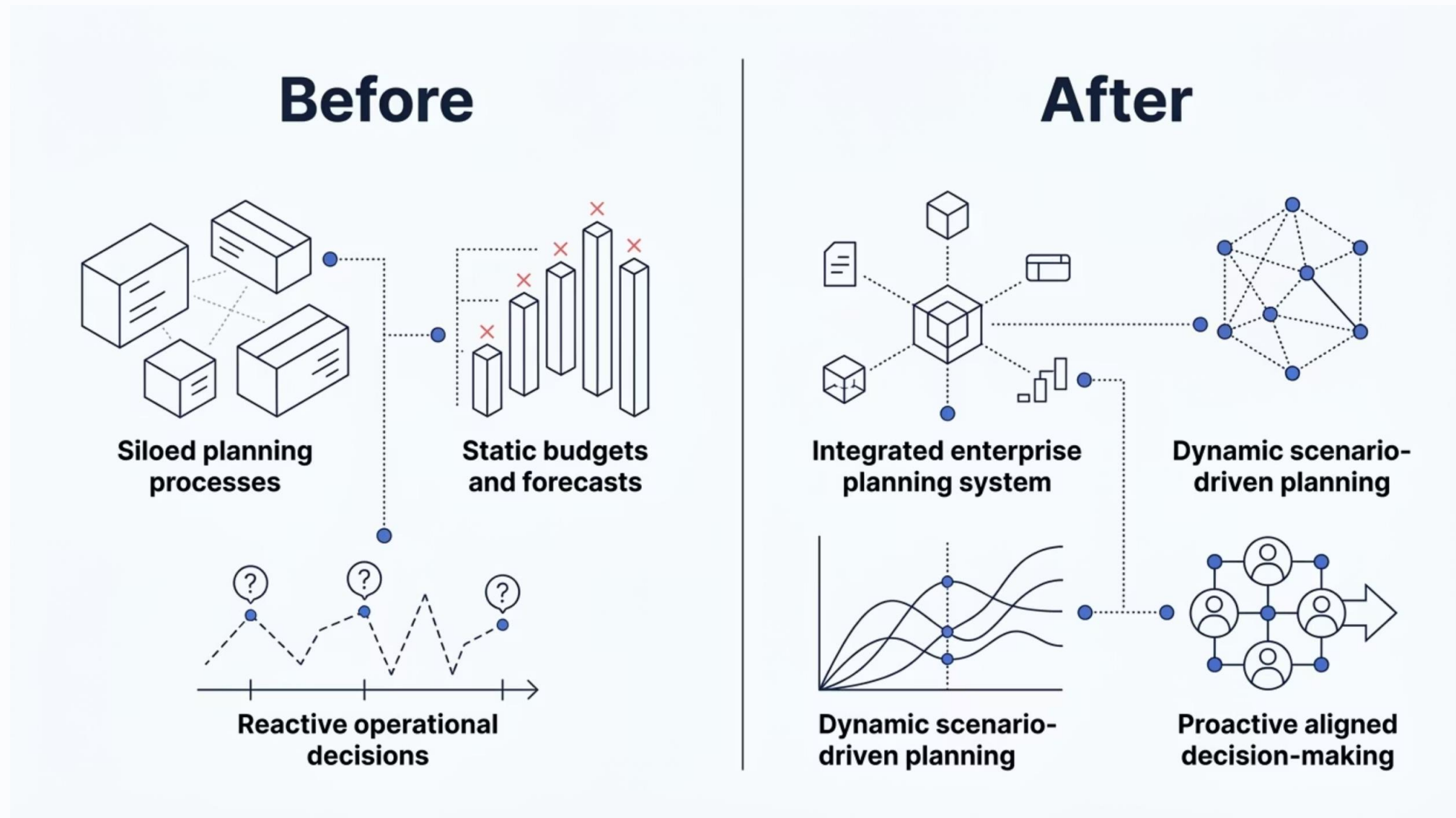
This fragmentation created a compounding effect: misaligned targets led to conflicting decisions, which drove inefficient resource allocation, which ultimately caused the enterprise to miss its financial commitments – quarter after quarter. Leadership recognized that the problem was not a lack of capability within any single function, but the absence of a unified planning architecture connecting all three.

The Fortis & Peak Intervention: IBP Fusion™ Framework

Fortis & Peak deployed a comprehensive five-part intervention to rebuild the enterprise's planning architecture from the ground up, centered on the proprietary **IBP Fusion™ Framework**.

- 1 IBP Fusion™ Deployment**
Designed and implemented an Integrated Business Planning model that unified strategy, finance, and operations into one synchronized process with a single enterprise planning cadence.
- 2 Demand–Supply–Financial Integration**
Linked demand forecasts with supply capabilities and integrated financial implications – revenue, cost, and margin – into planning cycles, creating end-to-end visibility from demand to EBITDA.
- 3 Scenario-Based Planning**
Introduced dynamic scenario modeling covering demand fluctuations, cost changes, and capacity constraints, enabling leadership to evaluate trade-offs before execution.
- 4 Governance & Decision Cadence**
Established cross-functional planning forums including monthly IBP reviews and executive alignment sessions, with clear ownership defined across CEO, CFO, and COO roles.
- 5 Execution via PeakFlow OS**
Connected planning outputs to real-time execution through dashboards linking operational KPIs and financial performance, enabling rapid response to deviations.

The Transformation: From Siloed to Integrated



The shift was not merely procedural — it was architectural. The enterprise moved from a world where each function planned independently, using its own assumptions and timelines, to a world where a single integrated system governed all planning activity. Static annual budgets gave way to dynamic, scenario-driven planning that could adapt to real-time business conditions. Reactive firefighting was replaced by proactive, aligned decision-making grounded in a shared view of enterprise performance.

Measurable Impact

The IBP Fusion™ transformation delivered quantifiable results across forecast accuracy, financial performance, and organizational agility – validating the business case for integrated planning at the enterprise level.

30%

Forecast Accuracy Gain

20–30% improvement in forecast accuracy across the enterprise planning cycle.

8%

EBITDA Outperformance

5–8% EBITDA performance improvement versus plan, driven by aligned decision-making.



Planning Cycle Time

Significant reduction in planning cycle time, freeing leadership for strategic decisions.



Decision Speed

Improved cross-functional alignment and decision speed with higher reliability in meeting financial and operational targets.

Strategic Outcome & Key Insight

The organization transformed planning from a functional activity into a **strategic enterprise capability**. The shift in mindset was as significant as the structural change: instead of each function planning independently and hoping for alignment, the enterprise began to plan and execute as one unified system.

Financial targets became achievable because they were grounded in operational reality. Operational decisions became disciplined because they were anchored to financial consequences. Strategy became executable because it was translated into synchronized plans across every function.

"Planning is not about creating plans – it is about aligning decisions across the enterprise."

When planning is fragmented, performance is unpredictable. When planning is integrated, performance becomes controlled. This is the core principle that guided the transformation – and the enduring capability the organization now holds.

The Enterprise Shift

From: "Each function plans independently"

To: "The enterprise plans and executes as one system"

Three Pillars of IBP Success

- Single version of truth across all functions
- Dynamic scenario modeling before execution
- Governance cadence with clear ownership

Fortis & Peak: Enabling IBP Transformation

OPERATIONS & EFFICIENCY

STRATEGIC PROOF

Fortis & Peak Consulting & Investment enables organizations to redefine strategic direction and realign operating models to unlock sustainable growth. The firm combines the rigor of top-tier advisory with a distinctly hands-on approach – translating strategy into measurable performance, operational discipline, and scalable execution.



IBP Fusion™

Integrating strategy, finance, and operations into one synchronized planning architecture that drives enterprise-wide alignment.



Unified Planning Cadence

Establishing governance structures, cross-functional forums, and decision rhythms that sustain alignment beyond the engagement.



PeakFlow OS

Connecting planning to real-time execution through dashboards that link operational KPIs and financial performance for rapid response.

Fortis & Peak engages selectively with organizations that seek clarity at the top, precision in execution, and results that endure well beyond the engagement.



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Shaping What's Next